

Associate Performance Planning Worksheet - AFGE Bargaining Unit Employees

Employee Name: [REDACTED]

Position: Financial Management Specialist, GS-0501-12

Organization: BR3B

Main Appraiser [REDACTED]

Date Developed: [REDACTED]

Date Issued: [REDACTED]

Critical Element: EASi Support, Pegasys Support, and Coordination(20%)

Description:

Derived From	General Measure	Specific Measure	Standards/Exception					Feedback Source For Monitoring
			Level 1	Level 2	Level3	Level4	Level5	
Position Description (PD), GSA goals, CFO/ARA/RA Performance Plans	Quality, Timeliness, Consistency	Ensures proper and timely processing of obligations and payments in EASi and Pegasys and provides necessary support and training Uses judgment to determine when to escalate issues	Does not meet performance expectations as defined in Level 3 Reminders are often needed regarding which payments fall within level of responsibility Unable to independently provide EASi support Issues are not escalated appropriately	Partially meets performance expectations as defined in Level 3 Reminders are occasionally needed regarding which payments fall within level of responsibility Requires support to answer a majority of EASi questions and resolve errors Issues are minimally escalated appropriately	Ensures proper and timely processing of obligations and payments in EASi and Pegasys Processing includes but is not limited to D7 payments, ESPC contracts and EK contracts which retain the need for regional maintenance Most payment requests are processed within 2 business days of initial receipt Provides necessary systems support and training to peers and PBS customers Uses judgment to determine when to escalate issues	Meets and often exceeds performance expectations as defined in Level 3 Most payment requests are processed within 2 business days of initial receipt, and a large majority within 1 business day Able to resolve a majority of EASi issues independently Involved with determining corrective actions needed for new EASi issues, and shares results appropriately	Almost all payment requests are processed within 1 business days of receipt Able to resolve EASi issues independently Actively works with system developers to identify corrective fixes for the system	Supervisor, directors/ARA/RA, other managers, colleagues, customers, CO, Finance Center

Critical Element: Open Item, Invoice and Utility Support(20%)

Description:

Derived From	General Measure	Specific Measure	Standards/Exception					Feedback Source For Monitoring
			Level 1	Level 2	Level3	Level4	Level5	
Quality, Timeliness, Consistency	Position Description (PD), GSA goals, CFO/ARA/RA Performance Plans	Supports coordination of regional open items and invoices to include monitoring, timely responses to inquiries and necessary training Supports review and funds certification for Utility contracts	Does not meet performance expectations as defined in Level 3 Unable to provide timely responses to inquiries regarding open items, invoices, or utilities Review, follow-up analysis, and contact with the appropriate POC not performed	Partially meets performance expectations as defined in Level 3 Monthly or weekly reports contain a minimally appropriate level of analysis to determine priorities for review and follow-up Review, follow-up analysis, and contact with appropriate POC minimally performed Analysis on past actions and/or recommended next steps not provided when requesting escalation	Supports coordination of regional open items and invoices to include monitoring, timely responses to inquiries and necessary training Unliquidated Obligations (Open Items) reviewed monthly and coordinated with appropriate regional POCs to resolve invalid or undetermined items Unmatched invoices to be reviewed weekly with high risk items identified Utility PRs reviewed within 2 business days of receipt Accurate tracking of Utility contract actions and contract expenses Uses judgment to determine when to escalate issues	Meets and often exceeds performance expectations as defined in Level 3, plus personal contact made for all high risk items that appear on multiple reports Proactive analysis on monthly reports which leads to items being resolved timely Training given to others to resolve issues and prevent future high risk items Provides Utility usage analysis for budget projections	Meets and consistently exceeds performance expectations as defined in levels 3 and 4, plus develops guidelines and/or shares best practices nationally	Supervisor, directors/ARA/RA, other managers, colleagues, customers, CO, Finance Center

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Employee Name: (b) (6)

Position: Financial Management Specialist, GS-0501-12

Organization: BR3B

Main Appraiser (b) (6)

Date Developed: (b) (6)

Date Issued: (b) (6)

Derived From	General Measure	Specific Measure	Standards/Exception					Feedback Source For Monitoring
			Level 1	Level 2	Level3	Level4	Level5	
		Uses judgment to determine when to esc						

Critical Element: Financial Analysis and Reporting(20%)

Description:

Derived From	General Measure	Specific Measure	Standards/Exception					Feedback Source For Monitoring
			Level 1	Level 2	Level3	Level4	Level5	
Position Description (PD), GSA goals, CFO/ARA/RA Performance Plans	Quality, Timeliness, Consistency	Consistently and timely responds to financial management inquiries by researching, analyzing, reporting and following through Raises concerns when appropriate	Does not meet performance expectations as defined in Level 3 Reports require corrections greater than 50%, or reports contain major errors that prevent the report from being shared No analysis of results	Partially meets performance expectations as defined in Level 3 Reports require corrections 30-50% of the time Major anomalies usually lack annotation and/or corrective action plan	Timely responds to financial management inquiries by researching, analyzing, reporting, trending and/or following through Analysis and reporting are clear, complete and accurate Any follow up issues are timely addressed Raises concerns when appropriate	Meets and often exceeds performance expectations as defined in Level 3 Reports are consistently accurate (no corrections needed, anomalies noted), and corrective actions taken so that anomalies are corrected within 2 months	Meets and consistently exceeds performance expectations as defined in Level 3 Consistently exceeds performance expectations for levels 3 and 4, plus sharing best practices nationally	Supervisor, directors/ARA/RA, other managers, colleagues, customers, CO, Finance Center

Critical Element: Internal and External Customer Relationship Management(25%)

Description:

Derived From	General Measure	Specific Measure	Standards/Exception					Feedback Source For Monitoring
			Level 1	Level 2	Level3	Level4	Level5	
Position Description (PD), GSA goals, CFO/ARA/RA Performance Plans	Quality, Timeliness, Consistency	Builds rapport and working relationship with colleagues (within division) and customers (within region, CO, Finance Center and contractors/independent	Does not meet performance expectations as defined in Level 3 Does not reach out to appropriate points of contact for resolution of items Does not utilize direct communication methods (face-to-face, phone call, email dialogue) to develop relationships and resolve issues Does not follow through to ensure that issues have been fully resolved	Partially meets performance expectations as defined in Level 3 Partially meets performance expectations as defined in Level 3 Often requires assistance or reminders to provide products or services to customers	Builds rapport and working relationships with customers, colleagues and peers within the division, region, zone, CO, Finance Center, CPG, and other contractors/independent reviewers Provides products and services in a timely manner, anticipating the needs of colleagues and customers Ensures coverage and continuity of work Able to identify appropriate points of contact within division and with customers to resolve issues Uses judgment to determine when to escalate	Meets and often exceeds performance expectations as defined in Level 3 Shares lessons learned and best practices within division, region and zone Anticipates customer needs and reaches out proactively to prevent issues from developing	Meets and consistently exceeds performance expectations as defined in Level 3 Shares best practices via national community of practice forums	Supervisor, directors/ARA/RA, other managers, colleagues, customers, CO, Finance Center

This worksheet is only intended to assist you in completing the OFFICIAL Associate Performance Plan and Appraisal documents as identified by GSA Order CPO P 9430.1

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		reviewers), consistently and timely provides services and products to them, anticipates their needs			issues Performs appropriate follow-up to ensure that issues have been fully resolved			

Critical Element: Internal Process Improvements and Special Projects(15%)

Description:

Derived From	General Measure	Specific Measure	Standards/Exception					Feedback Source For Monitoring
			Level 1	Level 2	Level3	Level4	Level5	
Position Description (PD), GSA goals, CFO/ARA/RA Performance Plans	Quality, Timeliness, Consistency	Provides recommendations for improvements and identifies best practices and lessons learned Consistently and timely attends relevant meetings and conference calls Demonstrates ability to problem solve and complete other projects timely	Does not meet performance expectations as defined in Level 3 Does not provide recommendations for improvement or other problem solving analysis	Partially meets performance expectations as defined in Level 3 Rarely participates in meetings and/or rarely puts into practice processes and recommendations shared in meetings	Provides recommendations for improvements and identifies best practices and lessons learned Attends relevant meetings and conference calls Demonstrates ability to problem solve independently and complete other projects timely	Meets and often exceeds performance expectations as defined in Level 3 Anticipates and proactively develops solutions to current issues Shares analysis and lessons learned with zonal counterparts Provides training as needed to share results	Meets and consistently exceeds performance expectations as defined in Level 3 Shares best practices via national community of practice forums	Supervisor, directors/ARA/RA, other managers, colleagues, customers, CO, Finance Center